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**Report:**

**Evaluation of NLHF funded business support programme 2021-2022:**

**One year follow up**

Prepared for:

Museum Galleries Scotland

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Prepared by:

Linda Roddie

Account Director

Axiom Research & Consultancy

27 Woodside Place

Glasgow

G3 7QL

Tel: 0141 212 7980

Email: linda@axiomconsultancy.co.uk

www.axiomconsultancy.co.uk

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**Section 1: Background to the Business Support Programme**

**1.1 Introduction**

Museum Galleries Scotland (MGS) is the National Development Body for museums and galleries in Scotland. Consultation with the heritage sector identified the need for heritage organisations to develop sustainable and resilient business models to enable them to move forward, addressing the economic and workforce challenges developing in the sector, as well as those arising from Covid 19 and its impact on business viability.

A partnership between the National Lottery Heritage Fund (NLHF), MGS, Build Environment Forum Scotland (BEFS) and greenspace scotland developed a leadership programme for heritage organisations which aimed to build capacity amongst the heritage workforce to effectively lead their organisations through turbulent times.

An 18-month resilience and leadership programme (Surviving to Thriving) was created to provide tailored development for 40 organisations (approximately 80 people) across Scotland on leadership, governance, business planning and community engagement. The Programme sought to deliver key outcomes for participating individuals and their organisations, as well as delivering wider benefits to local communities. It aimed to contribute to addressing sector-wide skills gaps and workforce development issues and the need to change business models to address the economic challenges associated with ongoing reductions in income and changes in visitor engagement patterns.

**1.2 The Business Support Programme**

The Programme aimed to support specific objectives outlined by partners, including:

* Expanded networks of personal and professional support
* Strengthened and more diverse governance
* Increased financial resilience
* More diverse sources of income and increased income
* Greater reach into their community/communities with expanded and more diverse supporter, audience and/or volunteer base
* Better understanding of how to engage with local communities and use programming to be more inclusive, sustainable and involve more people
* Improved confidence and resourcefulness.

Forty-one (41) organisations were selected to take part (although one organisation subsequently withdrew before the Programme started). The organisations represented a cross section of the sector and varied by:

* Organisational size
* Organisational structure
* Composition of Board and management team
* Size of management team
* Extent of involvement of employees and volunteers
* Geographical location
* Sub sector within the heritage sector.

The Programme, which commenced in April 2021, was based on four topics, entitled:

* Leadership
* Governance
* Business Planning
* Communications and Community Engagement.

**Section 2: Follow on discussions**

**2.1 Approach**

Invitations were extended to all 40 organisations that had participated in the Programme (80 individuals). From these, a total of 12 individuals (from 9 organisations) agreed to take part in follow up discussions. A further 6 participants were no longer with the organisation and could not be contacted.

Discussions with participants were conducted via Microsoft Teams. The organisations were varied, indicative of the diversity of the sector itself, in terms of sub-sector, workforce size and structure, income size and location of operation. Given this, and the small sample size, the feedback from the discussions is presented as anonymised case studies, illustrating:

* Reasons for participating
* How the learning has been applied
* What is done differently as a resulted
* What benefits have resulted.

**2.2 Case study A**

A large, community-led, organisation which has been in operation for more than 10 years and is based in the Central Belt in Scotland. Its workforce combines 20 staff and a number of volunteers. The organisation has expanded its activities considerably since its inception and its workforce has grown accordingly. It is funded through a combination of grant funding and local fundraising.

The Programme was attended by two Board members and three staff members. One Board member attended Leadership and another attended Governance and Business Planning. Staff attended Communications and Community Engagement.

**Reason for attending the Programme**

The Board had recognised a need for attract more sustainable funding, as much of the existing funding was public sector provided generally on an annual basis, with occasional three- year grants. The organisation had also been experiencing staffing issues, with a regular turnover of staff, making it difficult to develop and maintain effective teamworking.

**How learning has been applied**

The Programme encouraged participants to consider how to achieve sustainable income without increasing making the organisational size and structure unmanageable.

*“We have been able to set out a clear vision which meets our community values. We have always known what we wanted but the Leadership session helped us put that into a more formal vision and values”*

*“We realised that we did not want to grow existentially and we also realised we needed to think more creatively about generating income. The discussions in the Business Planning session made us realise that we could make more of the assets we had. So, we looked at how we could get more out of the land we own and what we could do with that to generate income, whilst still meeting our values”.*

*“We had a plan before but the Governance and Business Planning sessions made us realise that we needed a risk register. We also completed a SWOT analysis as a Board”.*

*“We have been working on our approach to managing people. We have made our systems more transparent so staff and volunteers can see how and why things are done. We have also looked at people’s roles so that we don’t overburden people with too many tasks”*

**What difference it has made**

Three key changes were recognised which were attributed to what participants learned during the Programme.

*“We now have a formal, strategic plan and we had a Board and Manager Away Day a few weeks ago to continue our strategic planning. We wouldn’t have done this before”*

*“We take a more collaborative approach to what we do. It used to be that only one person did all our fundraising. It put a lot of stress on them and it was also risky if that person left as no-one else was involved. So, we have trained up other people and we have a few people who do fundraising applications now”*

*“We have also taken a more formal approach to systems to make things more structured. We recently invested in an HR system which records things like annual leave and does our payroll. Again, it’s more transparent as well as being less stressful for people”.*

**Benefits**

*“I think the organisation is on a more secure footing … it feels more robust. We have lowered the risk from widening our income generation and spreading roles and responsibilities. Income is from a range of sources now and more people are able to contribute to key activities such as business planning and fundraising”*

*We have spread our risk as a result of the discussions in the Programme – the risk from having only one person doing fundraising is now gone because we have shared this out with others and the risk from short term income sources is less as we have developed regular income streams from doing more with what we have”*

*“We were nominated for a national award and were shortlisted to the last four. This is a recognition of how far we have come since the Programme”*

**2.3 Case study B**

A charitable trust operating in the heritage sector for over 20 years. It has 9 Trustees and a small management team and staff. The trust is also supported by a number of volunteers in a range of roles. It is funded through a combination of grant funding and local fundraising.

**Reason for attending the Programme**

With a small management team and staff, the Board were keen to enhance team working and encourage greater staff engagement and active involvement in decision making. The trust is based in a rural area with a limited population base. In addition to effective team working, the Board were also keen to learn ways in which they could increase the number of volunteers and encourage them to become more involved in the day-to-day operations.

The Programme was attended by two members of the management team, who attended all four topics of Leadership, Governance, Business Planning and Communications and Community Engagement.

**How learning has been applied**

In reviewing its communication with its workforce, the Programme has also encouraged Trustees and management to review its strategic as well as operational communications.

*“We have a mission statement and aims which we had before attending the Programme. However, I realised that we needed to review these to make sure they are clear and meaningful to everyone – staff, volunteers and Trustees”*

*“We have also looked at our approach to performance management and realised that this needed to change. It was very top down and we wanted it to allow people to become more involved in the conversation rather than feel they were being talked at”*

**What difference it has made**

Feedback from the organisation suggests that the Leadership and Business Planning sessions were the most beneficial for participants and have been topics which have encouraged change in working practices and processes in the trust, particularly relating to communication and performance management.

*“I think the biggest difference the Programme made was in helping us understand why people talk and behave in a particular way. The colour wheel changed how I saw people in particular. It helped me understand why I relate better to some people and not to others and I have changed how I approach some people and also how I react to their communications with me. I have a better understanding of where they are coming from”.*

*“We have a very paper-based performance management system. It wasn’t really encouraging involvement with staff. We have completed reviewed and revamped our approach – we haven’t used it yet but we are hoping it will be a more positive experience for people.*

**Benefits**

*“Our working relationships are so much better now. We understand each other better and it makes for a much more positive environment”.*

*“I think I am better at connecting with people now because I can see things from their point of view”*

**2.4 Case study C**

A rural museum with a small group of Trustees and staff, supported by a larger team of volunteers. The workforce also includes temporary funded posts, including those funded through the Young Person’s Guarantee Scheme. The museum is funded through a combination of grant funding and local fundraising.

One of the managers participated in the Programme, attending all four topics.

**Reason for attending the Programme**

The Trustees and Manager were seeking to attract funding from a wider range of sources to increase museum income and improve funding sustainability. They were also keen to increase the museum’s reach locally and nationally to attract more volunteers and visitors to the facility.

**How learning has been applied**

The Programme has encouraged the museum to review its approach to funding raising and working with volunteers, as well as broadening its reach into the community.

Funding

*“I learned such a lot from the Programme. We have started using the funding planning forms we were given which has helped formalise our approach to funding applications”*

*“It’s encouraged us to do think differently. We got fundings form a development office and they will now help with the funding applications. Before it was just me, which was quite a strain, it’s better to have more than one person doing this”*

Marketing

*“We applied to the Young Person’s Guarantee Scheme – this has given us funding for temporary posts which has enabled us to get help with our online marketing. This is really helping our profile – we are being contacted by organisations from all over the UK and we are doing some really exciting collaborations as a result”.*

Volunteers

*“We have also really looked at how we work with and manage volunteers, trying to get them more involved and keep them engaged. We do a lot of communication with them, which we didn’t do so much of before”.*

*“We used the colour wheel with our volunteers and have matched their roles to their personalities. We are also developing more structured training for them”*

**What difference it has made**

Community engagement

*“We have started a club for young people, this was suggested by one of our young people from the Young People Guarantee Scheme. We are now getting a whole new generation of people interested in what we are doing”*

*“We took on board some of the ideas from the Community Engagement session and we now have a mid-week memories club – this reaches out to people in the community with dementia. It’s been so popular we need a bigger space”*

Marketing/social media

*“We have reached out to other organisations as well, looking for help with things that we have struggled with in the past. We are really taking on social media more and have introduced podcasts which we are working with another local community group to help us with. We have also introduced animations on to our website, with the help of one of the young people who came to us through the Young Person’s Guarantee Scheme. This has been fantastic in helping us reach out to children and young people in the community to encourage them to get interested in their local history”*

Fundraising

*“We have also had more fundraising events to help raise money. We are thinking bigger since the Fundraising session in the Programme and we have also introduced a Go Fund me site too. We also do more outreach, going to more events which has helped raise our profile”.*

**Benefits**

*“We have increased our volunteers as a result of us doing more work in the community and raising our profile. We have achieved the King’s Award for volunteers as well. This recognises the work we are doing – we also have got young people volunteering which is fantastic”*

*“We have increased our web traffic substantially, its over 10,000 hits this year – way more than before. We do online exhibitions now, something we would not have thought of before and this is helped by an apprentice funded by MGS”.*

**2.5 Case study D**

A rural museum which has operated for 60 years and has nine trustees and eight managers and staff. It is funded through a combination of membership fees, grant funding, local fund raising and donations.

Participants attended Leadership, Business Planning and Communications and Community Engagement sessions.

**Reason for attending the Programme**

The Board had started to review their business strategy and were keen to enhance their strategic planning. In addition to attending the Programme, the Board also commissioned a day with Blue Sky to further develop their mission, vision and values.

**How learning has been used**

The Programme has enabled the organisation to review and enhance its strategic and fundraising processes.

*“We had a strategy in place but felt that it was sufficiently detailed in terms of setting out what we needed to do. The training Programme was incredibly useful for helping us better define our vision and values. It helped get buy in from everyone to where we wanted to go, which was really important”*

*“It also opened our eyes to fund raising. We saw that in a quite limited way before and now realise that applying for grants is a key way of fundraising”*

*“The Leadership sessions and the colour wheel made me realise that people are different and there are different ways of working with people to achieve what you want”*

**What difference it has made**

*“We have started work on an action plan, linking it to the new strategy so that we have a clear plan of how to take things forward”*

**Benefits**

*“We have improved and enhanced our communications with our Trustees and staff and are working more to get them involved and keep them involved. As part of this we have signed up to the Fair Museum Jobs movement which encourages fairness and transparency, equity and inclusiveness in job recruitment and employment”.*

**2.6 Case study E**

A conservation trust based in the Central Belt in Scotland. The trust has been operating for over 30 years and has 6 trustees, a staff complement of 7 and a range of volunteers. The trust is funded through a combination of donations, grants, subscriptions and local fundraising.

The Programme was attended by a manager and member of staff. The manager attended the sessions on Leadership, Governance and Business Planning and the staff members attended Communications and Community Engagement.

**Reason for attending the Programme**

The trust already had a focus on governance but was seeking to strengthen its approach to business planning and strategy.

**How we have used the learning**

The Programme has enabled the trust to develop its strategic planning and has encouraged it to widen its reach into communities and in the sector.

*“The business planning sessions, particularly on fundraising, were very strong. It spurred us on to produce a strategy. We have created a five-year strategy which was ratified at our recent Board meeting”.*

*“We made good contacts with other organisations who attended the Programme and we have kept up some of this, sharing ideas. We didn’t really do this before”.*

*“We do a weekly round up on Facebook of what we have been doing and we have shared this with other groups to increase awareness. The marketing session has encouraged us to put ourselves out there more. We also give out more information for people – stuff that will encourage them to come in and see us”*

**What difference it has made**

*“As a result of the Programme, this time we involved the Board, staff and volunteers in developing the strategy. This is the first time we have done this and we feel we now have a broader buy-in to it. It took more time to create it but it’s been worth it as people are committed to it”*

*“We have also turned the strategy into local work programmes for the staff so people can see clearly what they are doing and how this links to the strategy”.*

*“We completely re-vamped our Trustee recruitment. This was something we had not anticipated doing but the Leadership and Business Planning sessions made us realise we needed to focus more on the recruitment side of things. It’s more like our approach to staff recruitment now. We spent a lot of time setting out what we wanted and we got 11 applicants which we were delighted with. We then could filter these to identify who we wanted to speak with. The strategy really helps us see what skills we needed on our Board”.*

*“We use social media lo lot more now and use it to talk to potential visitors and other organisations, telling them about us and what we are doing”.*

**Benefits**

*“I think we are in a good position. We have new ideas for funding as result of re-shaping our strategy and our staff are more committed to it because they were more involved this time”.*

*“We have massively increased our Facebook followers and we also have a QR code to make it easy for people to donate – we have had more donations this year than previously”*

**2.7 Case study F**

An art gallery based in the North East of Scotland. It has been operating for over 50 years and has a team of 7 staff members and a range of volunteers. Two participants attended the training.

**Reason for attending the Programme**

The gallery was keen to enhance their fundraising strategy, with a range of options to suit a cross-section of potential funders. The gallery also wanted to develop a structure for fundraising applications which would enable people to respond effectively to short timescales for funding applications.

**How we have used the learning**

The Programme has encouraged the gallery to enhance its approach to fundraising and to strengthen its introduction of Trustees to increase understanding of roles and responsibilities.

*“Fundraising is usually done by our CEO which can make it difficult for them to cover all the potential funding sources. We are always worried we missed something. So, we have taken the learning from the Business Planning session and created a generic application response which people can then tailor to specific funds as required. This should make it quicker and also would allow more people to apply for funds, spreading the load”.*

*“The Leadership session also made us realise that we needed to introduce Trustee inductions. Trustees didn’t get an induction before, unlike staff and our Board only meets once a quarter so people could be in post for quite a bit before they get to speak to another Trustee.”*

**What difference it has made**

*“We are developing an induction programme for them which will explain their role, especially what they are legally responsible for”.*

*“The other staff member who attended the sessions has moved on – they have gone to another part of the sector so hopefully they will be taking their learning with them”.*

**Benefits**

*“The changes we have made are at an early stage so we are not yet able to fully determine the benefits”.*

**2.8 Case study G**

**A rural based heritage trust which has been operating for 25 years. It has 8 committee members and over 200 members. One committee member attended all Programme sessions.**

**Reason for attending the Programme**

The trust had a business plan and governance structures in place, prior to the training, however the Board wanted to enhance its working practices and strengthen its business planning.

**How learning has been applied**

The Programme has encouraged the trust to review its governance and business planning processes.

*“Although we had governance processes before the Programme, we realised that they could be better and the Governance session encouraged us to review how our Board was operating”.*

*“The Business Planning sessions also made us realise that we needed to spend more time on developing it, although we had one it wasn’t as detailed as it could have been”.*

**What difference it has made**

*“I think the Programme, overall, helped reinforce a lot of what we were already doing but it also highlighted some gaps especially in our governance and business planning which we probably wouldn’t have addressed without the training”.*

*“After the Programme we applied for and were successful in getting some external fundings to conduct a review of our Board. We have got a few new members so it was a good time to do it”.*

**Benefits**

*“Having the chance to discuss how we work as a Board and having had the learning from the Governance session I think our Board members are more confident in what they are doing – they feel they have a better understanding of their role and what is expected of them”.*

**2.9 Case study H**

A rural museum with nine Trustees and three staff, supported by a team of volunteers who support the museum during the spring and summer months. The museum has been operating for over 50 years and is funded through a combination of grant funding and local fundraising.

Trustees and staff participated in the Programme, attending various topics appropriate to their role.

**Reason for attending the Programme**

The trustees felt that they had a strong Board in place, with an existing strategic plan. However, they wanted to enhance their approach to strategic planning and fundraising. The Board were also keen to further develop the support provided for volunteers.

**How we have used the learning**

The Programme has encouraged changes in its approach to managing and supporting people, as well as enabling changes to its strategic plan.

*“We are delegating more because we have a better understanding of how people work, based on the colour wheel, and what this means for their roles and responsibilities. It’s also made us more aware of how we need to support people, especially the volunteers who are not with us all of the time”.*

*“After the Programme we sought external support on HR as we don’t have our own HR department. We approached our local Chamber of Commerce and sourced some free support which has been great”.*

*“We have always had a strategic plan. The training highlighted what we were doing well and it also made us realise that that the plan needed some improvement so we have been working on that”*

**What difference it has made**

Funding

*“Fundraising is really important for us but it takes up a lot of time. The funding climate is changing all the time so we also need to constantly adapt. We have changed our approach to fundraising since the Programme. We are much bolder. It taught us that there were many ways to approach fundraising, to just go for it and see what happened. Before we would always assume we weren’t relevant for some funding and would not go after it”.*

Volunteers

*“We have included volunteers in our HR systems and processes now which we are hoping will make them feel more included”.*

**Benefits**

*“We have broadened our funding pot as a result of changing our thought process on funding and applying to sources we would not have considered before”.*

**2.10 Case study I**

A community-led trust, based in the Central Belt in Scotland and has been operating for almost 20 years. It has a Board of Trustees, supported by 5 members of staff and a range of volunteers. The museum is funded through a combination of grant funding and local fundraising.

The Manger attended all four Programme topics, with Trustees attending Leadership and Business Planning.

**Reason for attending the Programme**

The trust had a business plan in place prior to the Programme and they were seeking ways to enhance it further. They were also planning to recruit additional Trustees and were looking for ways to support an effective introduction to the role of a Trustee.

**How learning has been used**

The Programme has encouraged changes to the trust’s approach to performance review and fundraising.

*“The Programme came at the right time for us, we were in lockdown which meant that we had the time to devote to the training as well as the time to think about how to apply it”.*

*“We have made gradual changes. Some of the information on strategy and business planning confirmed what we were doing”.*

Leadership

*“Although some of the examples used were very corporate and a bit too big for us as a small organisation, we did apply the information on the performance review. This was really important for us in making our reviews balanced and more positive for people”.*

Funding

*“This was really helpful, the information they gave us was brilliant. It has changed how we approach fundraising; we are much better at identifying what funds to apply for and much more focused in what we put in our funding applications”.*

**What difference it has made**

Board recruitment

*“We are recruiting for new Board members and it has helped us be more specific in our advertising of the role. We have been able to identify what skills we need and are currently missing and we have tailored our advertising accordingly. There is much more information for people about what we need and what Trustees do which we are hoping will help attract more candidates”.*

Performance reviews

*“We have re-shaped our performance reviews and have incorporated the two positive and two negative things into the review which gives people the chance to talk about how they think they are doing”.*

**Benefits**

*“We have promoted one of our management team who attended the Programme to CEO – the knowledge gained at the strategic level really supported this promotion”.*

*“The performance review discussions are more helpful. They have a more positive focus and people are participating in the discussions more than they were before and I think feel that they are getting more out of it”.*

**Section 3: Conclusions and recommendations**

**3.1 Conclusions**

The feedback from the participating organisations suggests that the Programme has not only been well received but has encouraged adoption of much of the learning from the sessions. The Leadership and Business Planning appear to have spurred the most action with examples of enhancements to strategic planning, action planning and performance review in particular, irrespective of the size of the organisation or the sub-sector of operations. Even organisations which had strategic and business plans already in place have taken learning away which has enabled them to enhance and augment existing plans.

Board development was another key area in which participants have applied learning, with examples of organisations further defining Board and Trustee roles and responsibilities, particularly in terms of legal responsibilities and governance. The Programme also seems to have encouraged some organisations to continue with Board development with external support. The learning on leadership and governance has also been used by some participants to improve their Board and Trustee recruitment process by enabling them to hone in on the skills and experience needed within their organisation and focus their recruitment on filling these gaps. One organisation has seen an increase in the number of Board candidates as a result of this approach.

The sessions on fundraising were also highlighted by participants as greatly improving not only the funding applications made by organisations but also in changing their mindsets in terms of potential fundings sources, resulting, in some cases, in increased income for the organisations. The fundraising sessions also highlighted to some organisations, the risks resulting from the process being undertaken by too few people and this has resulted in the re-scoping of some roles and responsibilities to minimise that risk. This has also enabled some organisations to increase their funding raising activities which, in turn, have increased income.

There were also examples of organisations increasing their focus on volunteers and introducing development programmes aimed at increasing volunteer engagement in the organisation. Volunteers have also been included in HR processes which would normally have been focused on employed staff only.

There were also examples where organisations have augmented their existing marketing activity to include a greater focus on social media and online communications. In these cases, this has resulted in an increased engagement from the public with organisational communications. There were examples where website and Facebook traffic had increased considerably.

Whilst the overwhelming feedback on the Programme from these participants was positive, there were some challenges in applying the learning which was identified and, which participants thought, if addressed would enhance the Programme further. It is recognised that these issues were raised at the post-Programme evaluation and will have been addressed by the trainers as part of the development of the Programme extension:

* Pre-training information
* Timing of the training days
* Networking post training.

 **3.2 Recommendations**

**3.2.1 Pre-training information and planning**

*Pre-training information*

Whilst information on the planned Programme content was included in the application process and in pre-training emails from MGS, participants appear to have had a different expectation of some of the content, particularly Communications and Community Engagement. Feedback from the post-training evaluation suggested that participants felt that they sent the wrong people to the course. Discussions with these participants in the follow-up interviews suggests a more limited implementation of learning from the Communications and Community Engagement sessions than from other topics.

It is understood that amendments have been made to the pre-training information provided to participants in the extension to the Programme.

*Planning process*

Overall, the content of the Programme was well received. However, some individuals suggested that some of the learning examples were too corporate or not appropriate for very small organisations and that this has made it difficult for them to apply some of the learning. It is understood that the training providers have received more information about participating organisations prior to the Programme delivery to enable more suitable examples to be provided.

**3.2.2 Timing of the training days**

The training was delivered in full day sessions. Participants highlighted that many Trustees are volunteers and have full-time jobs which have prevented them from attending the Programme. It may be beneficial to consider the possibility of sessions being available outside day-time working hours to increase Trustee uptake.

**3.2.3 Networking post training**

Feedback throughout the evaluation, including these follow up discussions, highlighted the importance of meeting and networking with colleagues from other organisations. Whilst a few participants had followed up with others after the Programme, most did not due to daily work pressures. Participants suggested that it would be beneficial for MGS to consider arranging result networking sessions to encourage ongoing communication, information sharing and practice development.